



August 4, 2005

Andrew Penca  
Deputy Commissioner  
Indiana Workforce Development  
10 N. Senate Ave.  
Indianapolis, IN 46204-2277

Dear Mr. Penca:

I am pleased to submit the Strategic Skills Initiative Planning Grant Application for Northwest Indiana, Economic Growth Region 1. We greatly appreciate the opportunity to work on this critical endeavor which will encourage the development of skills and promote personal growth for residents and economic growth for our communities.

We have been thoughtful and creative in our planning of this initiative utilizing institutional knowledge and sound advice from the executive team members of the consortium with whom we have met with twice. We have talked with our peers in Illinois regarding their experience in developing a critical skills shortage strategy and found this was a rigorous and time consuming project. We believe that even with this due diligence there will be facets of the work which we may not be anticipating. We have factored this into our required staffing and consultant services.

We envision this initiative to be part of an ongoing process which will be sustained. Both CWI and LCISDB have already undertaken initial research in seven industry clusters and have been fortunate to have received financial support and guidance from the public and private sector. This previous work has helped us understand the scope of work required and the benefits this effort can have for our community. We believe your thoughtful approach in developing the protocol for this initiative, which strongly reinforces local capacity building, will serve all of us well.

Please do not hesitate to call if you should have any questions. Once again, thank you for this opportunity to increase the skills of the workforce to better prepare NWI for the new global economy!

Sincerely,

Linda Woloshansky, President  
LW/lwb

cc: Jim McShane, President, LCISDB



INDIANA  
**WORKFORCE**  
DEVELOPMENT

Attachment 15

## Strategic Skills Initiative Research and ID Grant Cover Sheet

Economic Growth Region # 1 :

Center of Workforce Innovations  
Lake County Integrated Services  
Delivery Board

### 1. Funding Request

Requested: \$ <u>356,360</u>	Start Date: <u>9/6/05</u>	End Date: <u>2/22/06</u>
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### 2. Designated Grantee

Organization Name: <u>Center of Workforce Innovations</u>		Telephone Number: <u>219-462-2940</u>
Address: <u>2804 Boilermaker Ct., Suite E</u>		Fax Number: <u>219-465-6860</u>
Address:		Email Address: <u>lwolo@innovativeworkforce.com</u>
City: <u>Valparaiso</u>	State: <u>IN</u>	Zip + 4: <u>46383 - 8418</u>
County: <u>Porter</u>	FEIN: <u>35-2099782</u>	

### 3. Contact Person

<input type="checkbox"/> Mr. <input checked="" type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Other	First Name: <u>Linda</u>	Last Name: <u>Woloshansky</u>
	Title: <u>President</u>	Telephone Number: <u>219-462-2940</u>
Address: <u>2804 Boilermaker Ct. Suite E</u>		Fax Number: <u>219-465-6860</u>
Address:		Email Address: <u>Same as Above</u>
City: <u>Valparaiso</u>	State: <u>IN</u>	Zip + 4: <u>46383 - 8418</u>
Member:	Name	

### Lead Team Members

Name:	Industry:	Title:	Signature:
Dr. Jeffrey Jones	Education	Vice Chancellor Academic Affairs	<i>Jeffrey Jones, PhD.</i>
Vince Galbiati	Econ. Develop.	Director	<i>Vince Galbiati</i>
Debora Butterfield	Chamber of Commerce	President	<i>Debora Butterfield</i>
Colleen Reilly	Utilities	Director Communications	<i>Colleen Reilly</i>
Jennifer Whaley	Econ. Develop.	Director	<i>Jennifer Whaley</i>
John Greaves	Labor	Program Chair Manu. Tech.	<i>John Greaves</i>

Harold Foster IT

President

*Harold Foster*

# Strategic Skills Initiative Application

Submitted by

The Center of Workforce Innovations  
in collaboration with  
The Lake County Integrated Services Delivery Board

August 1, 2005

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## Executive Summary

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The Center of Workforce Innovations (CWI) as the core agent and the Lake County Integrated Services Delivery Board (LCISDB) as the secondary agent are very pleased to accept our role in the Strategic Skills Initiative. This initiative, by addressing the needs of targeted employers in our region, is completely aligned with the path local WIBs have embarked upon. Our mission clearly states a commitment to provide working Hoosiers with the skills they need in order to thrive in an increasingly global economy. As the second largest region in Indiana and the 34th largest region in the United States, we feel this initiative is paramount to our region's success, and is why we have chosen to complete this work for up to three industries in Northwest Indiana.

Despite the signs of a healthy market throughout the U.S., the Midwest continues to lag behind the rest of the country in its recovery from the recession of 2001. Many of the employers that we work with have told us that they have tempered their plans for new investment, hiring and training over the last few years due to lingering concerns about the local economy and stagnant customer activity. Still, there are signs of growth and cautious optimism in many of the region's fastest-growing industries. Most of these employers have plans to expand their businesses and increase employment in the near future, but face obstacles due to increased foreign competition in their industry, rapid technology changes, and the need to develop more advanced skills among their incumbent workforce to keep up with these changes. The demand-driven outcomes of the Strategic Skills Initiative address those needs.

Both CWI and LCISDB have each successfully recruited employers to serve as learning networks which, through facilitated discussions, were able to identify worker skill deficiencies they had in common. Both organizations then provided customized solutions for employers to afford their workers with needed training. CWI has successfully implemented networks in manufacturing, logistics, information technology, professional services and healthcare. LCISDB has successfully created a learning network in the healthcare area. CWI has published targeted industry reports on the fastest growing and most critical industries in Northwest Indiana, including Healthcare, Professional Services, Advanced Manufacturing, Logistics/Distribution, Life Sciences and Information Technology and also a "Learner's Report" that tracks the number of graduates in various direct and indirect degree programs that support these growing industry clusters. LCISDB is currently conducting studies on Transportation/Distribution/Logistics (TDL) and youth.

### *Planning Consortia Members*

Through our industry cluster work and partnerships with Northwest Indiana community leaders, we have identified several champions for our regional SSI planning consortium who are willing and able to craft a plan to revitalize the region's workforce and carry the task of the Strategic Skills Initiative to completion. CWI and LCISDB have already conducted two executive team meetings with consortia members during the month of July 2005.

**Deb Butterfield** is the President of the Greater Valparaiso Chamber of Commerce and an officer of the Valparaiso Economic Development Corporation. Deb has extensive experience in

economic development and creating programs to meet the needs of employers. She helped build the Porter County Economic Development Alliance, a strategic partnership among several economic development organizations in Porter County, and is a recognized leader in the Northwest Indiana Chamber Coalition.

**John Greaves** represents labor and is currently the Program Chair for Manufacturing Industrial Technology with Ivy Tech Community College of Indiana. Prior to his retirement from Bethlehem Steel Burns Harbor, John held various union leadership positions within the United Steelworkers (USWA Local 6787) and served as president of the Northwest Indiana chapter of the AFL-CIO for several terms. John worked closely with employers in Northwest Indiana to help Ivy Tech develop specialty certification programs in process automation and logistics. He has an extensive background in training and labor, and firsthand knowledge of how to align curriculum to meet the skill gaps of the workforce across many sectors in Northwest Indiana.

**Vincent Galbiati** is the Executive Director of the Northwest Indiana Forum (NWIF), a privately-funded economic development organization that is charged with regional growth through business retention, expansion and attraction. The NWIF provides advertising and public relations to promote the image of the region, in addition to providing consulting to businesses on exporting, technical assistance, financing and other services. NWIF has 100 members, representing \$40 billion in commerce to the region. Vince is a tenacious advocate for equitable taxation, environmental quality, transportation infrastructure, workforce development, entrepreneurship, healthcare and other issues.

**Harold Foster** is the President and CEO of Tugtel Communications and former Chairman of the Gary Chamber of Commerce. Tugtel is one of country's primary providers of engineering, material furnishing, and installation (EF&I) services to leading telecommunications equipment manufacturers and service providers such as SBC, Verizon, Bell South, Sprint, and AT&T. Harold actively promotes economic development and community reinvestment, and has led efforts to promote the Transportation, Distribution and Logistics industry in Northwest Indiana.

**Dr. Jeff Jones** is the Assistant Vice Chancellor for Engagement at Purdue University North Central. Jeff has also served as Vice President of the Michigan City Area Schools Board of School Trustees, Chairman of the LaPorte Regional Health System, Chairman of the Michigan City Area Chamber of Commerce and is currently president of the Boys and Girls Club of Michigan City. He is also a member of the Michigan City Economic Development Corporation Board of Directors and chairs its Technology Committee in addition to serving on several boards.

**Colleen Reilly** is the Director of Communications and Public Affairs for NIPSCO, a public utility serving the northern third of the State of Indiana. Colleen is responsible for all aspects of NIPSCO's media and public affairs, and has a depth of experience on community development and economic development issues. NIPSCO has assisted in bringing 180 businesses with 17,000 employees into the region.

**Jennifer Whaley** is the Executive Director for Newton County Economic Development. Jennifer's work has focused on economic development for business attraction and retention

projects, which often hinge on workforce issues. She is very familiar with the challenges facing the rural counties of Jasper, Newton, Pulaski and Starke in developing a highly trained workforce and attracting new investment.

In addition to the executive team, Consortia Members include the following community and business leaders:

<u>Healthcare</u>	<u>Company</u>	<u>County</u>
Amy Bean	Pulaski Hospital	Pulaski
Tony Ferracane	Community Hospital System	Lake
Gary Mitchell	Opportunity Enterprises	NWI**
Connie Ford	LaPorte County Hospital	LaPorte
 <u>IT</u>		
Greg Scasny	Golden Technologies	Porter
Richard Barnes	Hokey Spokes	Lake
 <u>Transportation</u>		
Bob Bernth	NICTD	NWI**
Travis Colbaugh*	Smith Transport	Jasper
 <u>Manufacturing</u>		
Scott Farrisee	The Chicago Faucet Company	LaPorte
Steve Wagner	Local 1010	Lake
Jim Hicks	J.W. Hicks	NWI**
Jim Wozniak	Mittal Steel	NWI**
 <u>Professional Services</u>		
Mike Baird	Mercantile Bank	NWI**
Bill Joiner	Structure Resources	Lake
 <u>Life Sciences</u>		
P. Scott Bening*	Monosol LLC	NWI**
 <u>Entertainment/Hospitality</u>		
Charlotte Cook-Hawkins	Trump Casino	Lake
 <u>Education</u>		
Dr. Dee Haklin	Ivy Tech Community College	NWI**
 <u>Agriculture</u>		
Matt Gibson	Gibson Farms	Newton

\* Invited – not confirmed

\*\* NWI = Northwest Indiana. For companies with locations in more than one county.

### *Involvement and Input of Agencies and Partners*

CWI first and foremost will work collaboratively with LCISDB. Additionally, imperative to the project's success will be continued close working relationships with some key agencies and partners to assist in research and outreach to employers:

Northwest Indiana Forum (NWIF) The NWIF serves as a regional economic development organization that works to attract new business and jobs to Northwest Indiana, and assist existing companies and communities with expansions and retention efforts. As the lead "marketing agency" for the region, NWIF provides assistance in the area of leveraging incentives, project coordination and advocacy on behalf of employers. NWIF has pledged its commitment to this effort at the executive and staff level.

Northwest Indiana Regional Planning Commission (NIRPC) NIRPC is the regional planning authority for Northwest Indiana that traditionally focused on transportation and planning issues, but recently expanded the scope of its mission to support economic development. NIRPC staff provides data collection and analysis, and will help leverage the assets and infrastructure needed to support the region's implementation of the Strategic Skills Initiative.

The Kankakee-Iroquois Regional Planning Commission (K-IRPC) KIRPC is the regional planning authority for Jasper, Newton, Pulaski, and Starke counties in our region. K-IRPC focuses on transportation and planning issues, with emphasis on rural transportation. Recently they have expanded to provide comprehensive planning by linking transportation planning with economic development.

### KV Works (KV)

KV Works is one of the Center of Workforce Innovation's service providers. KV Works is a 501(c)3 Non-Profit organization that provides education, employment, and training and re-training services to the residents of Jasper, LaPorte, Newton, Porter, Pulaski, and Starke counties. As partners in the WorkOne One-stop Centers in each of these counties they provide a broad array of services to adults, youth, dislocated workers, and employers.

### Workforce Development Services (WDS)

Workforce Development Services is a service provider for the Lake County Integrated Services Delivery Board. WDS, Inc. is a 501(c)3 non-profit organization that works to assist area job seekers in obtaining the skills needed to get good jobs and business in finding the employees they need to remain or become competitive in today's business climate. WDS, Inc. operates four WorkOne One-stop Centers in conjunction with Department of Workforce Development in Lake County.

### Regional Development Corporation (RDC)

The Regional Development Corporation assists companies with low-interest financing through the SBA 504 loan program. The RDC is a federally certified development company with a primary objective to provide financing for small businesses in conjunction with all lenders within the immediate area. They have provided funding for hundreds of companies in Northwest Indiana, enabling employers to invest in plant and equipment that created and retained jobs in addition to expanding the tax base of local communities.



#### Porter County Economic Development Alliance

The Porter County Economic Development Alliance is made up of the five economic development commissions in Porter County, along with three universities, the Porter County Convention and Visitors' Bureau and the Center of Workforce Innovations to coordinate economic development activities for the entire county.

#### LaPorte County Economic Development Partnership Alliance

The LaPorte County Economic Development Partnership Alliance is a partnership dedicated to countywide collaboration of economic development-related efforts and activities. The Alliance includes the cities of LaPorte and Michigan City and the various towns and communities within LaPorte County, the LaPorte County Commissioners and County Council, the Chambers of Commerce from Michigan City, LaPorte, Westville and Wanatah, the LaPorte County Convention and Visitors' Bureau, the economic development corporations of Michigan City and LaPorte, and Purdue University North Central.

#### Quality of Life Council (QLC)

The Quality of Life Council (QLC) is a public benefit corporation that was founded by college and university chancellors in Northwest Indiana to promote sustainable development in Lake, Porter, and LaPorte Counties. Organized as a public/private partnership, the QLC provides a forum for a diverse group of approximately 100 members of the public and private sector who meet on a regular basis to formally promote continuous improvement in the quality of life in Northwest Indiana through strategic planning, research, quality indicator reports, policy initiatives and advocacy.

#### Northwest Indiana Study Council

The Northwest Indiana Study Council is a regional consortium of 23 public school corporations within Lake and Porter Counties, represented by their superintendents.

#### Northwest Indiana Chamber Executives Association

This group includes executives from chambers of commerce in Lake, Porter and LaPorte Counties, and is very active in promoting business development, collaboration of community leaders on a regional basis, and quality of life issues.

#### *Request for Funding and Activities*

We have developed an integrated methodology to achieve the overall objectives of the Strategic Skills Initiative. We intend to utilize a mixture of consulting/contractual assistance, new and existing staffing, and internships in order to develop an implementation plan which will keep our line of sight unwavering and focused on the overall intended outcomes. Consultants will be utilized to perform duties that support the research and analysis needed for this initiative. This multi-faceted approach was selected based on the following points:

- Although CWI and LCISDB worked together on other projects and initiatives, past projects have not had the ambitious timeframes outlined and required by the SSI application.
- The joining of two areas as set forth in the new state plan presents imminent changes in roles and responsibilities of the two WIBs.

- The desire to build new capacity at the local level, while achieving the outcomes within a seven-month timeframe.
- The logistical challenge of engaging employers in each industry throughout a large geographic area, which will necessitate additional support in order to coordinate interviews, focus groups and ensure that every community is represented.
- And our desire to achieve a stretch goal of analyzing and providing skills gap solutions for up to three industry areas, as opposed to being satisfied with the minimal requirements. This we believe will push our region farther, faster and have more long term effects.

Therefore, to accomplish the objectives of the Strategic Skills Initiative, The Center of Workforce Innovations, after collaboration with Lake County Integrated Services Delivery Board, requests \$356,360 in funding to perform the following activities that shall serve as the foundation for ongoing sustainability:

- Conduct a job vacancy survey of employers throughout the seven counties of Northwest Indiana to aid in determining the top industry clusters for this initiative.
- Analyze targeted industries to aid in determining the top three industry clusters for this initiative, including workforce concentration through location quotient, industry competitiveness through shift-share analysis, and other research tools to measure industry cluster size and strength in the region.
- Interview key employers in each industry cluster to determine critical occupations in each key industry sector, along with projected growth rates, compensation levels, turnover, education and training requirements, and other variables.
- Validate occupational growth and replacement projections through available data sources and analysis of interviews with employers.
- Identify knowledge and skills needed for each critical occupation by key industry sector.
- Verify critical occupation gaps through interviews with employers and focus groups with incumbent workers.
- Analyze graduation and educational attainment data from area training and education providers.
- Identify the root causes of skill shortages, and develop solutions for implementation according to the specifications and goals of the Strategic Skills Initiative.
- Procure additional research and analysis support as needed.
- Facilitate focus groups, meetings and summits with cluster employers in each industry to explore feasible solutions that address short- and long-term shortages.
- Publish reports and disseminate to key stakeholders.
- Integrate strategies into the WorkOne/One Stop system that include both quantitative and qualitative measures of success.
- Develop baseline skill sets and educational requirements: utilize WorkKey profiles in those industry and employment areas of high growth for use in the marketing and skill enhancements of new and incumbent workers.
- Compensate staff time to coordinate these activities, while learning new skills intended to carry on with these strategies through online SSI workshops, consultant training and other resources.

- Hire an additional full-time strategic planning manager to serve as the overall project manager.
- Hire a consultant to assist with the project: to provide internal staff development and training, assist with research, analysis and coordination of data, process design, validation activities, focus groups, surveys and reports.
- Provide two internships to students from universities in the region to assist with data collection, analysis and other activities in addition to building their capacity for future employment in workforce development.

## Work Statement

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### *Qualifications of Staff*

Staff who are assigned to the Strategic Skills Initiative have already participated in the initial Web-based SSI Workshop Demonstration that was provided by IWD, and will continue to take part in all future workshops. Staff will also work with all consortium members to ensure comprehension and compliance with IWD's recommended methodology for this initiative as outlined in the *SSI How-To-Handbook*.

Project coordination of the Strategic Skills Initiative will be the responsibility of the Vice President of Strategic Research and Planning. A search is already underway for this position. Until this position is filled and the Vice President is fully integrated into this initiative, Jim McShane, President of LCISDB and Linda Woloshansky, President of The Center of Workforce Innovations will lead all activities and provide oversight and coordination of the work of staff, consortium members, consultants and interns.

### **TBD**

Vice President, Strategic Research and Planning, The Center of Workforce Innovations

The Vice President will lead the coordination of activities for the Strategic Skills Initiative with staff, consortium members, consultants and interns. This person will oversee the strategic planning and skill initiatives that support the short and long-term growth of the regional economy through labor market research, worker skill studies, wage studies, and other related activities. This position has the responsibility to plan, direct and conduct primary and secondary research projects and surveys to develop data for strategic initiatives, labor market publications, presentations, resource development activities related to the labor market and workforce development region. The Vice President will review, direct and conduct analysis of statistical data for implementing workforce development programs and for supplying information to appropriate bodies for strategic initiatives, policy development, labor market publications, presentations, resource development activities related to the labor market and workforce development region.

Additional duties for this position:

- Devises methods and procedures for collecting and processing data; and compiles data relating to research area such as employment, productivity, and wages and hours.
- Reviews and analyzes economic data in order to prepare reports detailing results of investigation, and to stay abreast of economic changes including projecting skill needs, industry and employment opportunities for the region.
- Confers with government officials, employers, labor leaders, and other parties to disseminate and secure information on employment problems and assist in formulating policies to meet demonstrated needs.
- Organizes data into report format and arranges for preparation of graphic illustrations of research findings.

- Seeks out partnerships and works toward developing systemic change that will imbue the work into the curriculum of local colleges and universities so as to provide future expertise to continue the work into the future.
- Performs other duties as assigned. Oversees the work of project team and completes overall project reports and updates.

### **Tina Rongers**

Data Project Coordinator, Lake County Integrated Services Delivery Board

Tina's full-time responsibilities include data collection, analysis and dissemination as requested by the Board and community partners as well as managing grant-related projects. Prior to joining the WIB, Tina worked for Morningstar, Inc within their International and Data Divisions and for State Farm Insurance in claims. She serves as a community resource by providing research services on independent projects.

She is currently pursuing a Masters in Public Planning and Policy, specializing in economic development, from the University of Illinois Chicago. She has a graduate certificate in Non-Profit Management from Indiana University Northwest, a Project Management Certificate from Loyola University and an undergraduate degree in Public & Urban Affairs from Indiana University-Purdue University Indianapolis. Tina is on the Board of Directors for the Shirley Heinze Land Trust and the Alliance for the Great Lakes, and she is a member of the Northwest Indiana Quality of Life Council.

Tina's role in the Strategic Skills Initiative as Data Analyst will include extensive data collection, analysis, tracking of activities, and other duties as assigned.

### **Matt Hunter**

Senior Associate Workforce Consultant, The Center of Workforce Innovations.

Since 2001, Matt has been working with employers in some of the fastest-growing industry clusters in Northwest Indiana, including Healthcare, Advanced Manufacturing, Professional Services, Logistics/Distribution, Information Technology and Life Sciences. Matt interviewed over 120 employers and industry leaders to compile a targeted profile report for each industry, with their insights on opportunities and challenges, obstacles to growth, industry trends, skills in demand, hiring forecasts, and recommendations for economic development and workforce development. Each report also included labor market data, industry cluster analysis, workforce pipeline forecasts and other indicators.

Matt has a MBA from Keller Graduate School of Management, with 9 years of collective experience in economic development and workforce development. He is also the Vice Chair of Partners in Contracting Corporation, an organization that assists minority, women, veteran and small businesses with various certifications and business development services to obtain federal and state contracts.

Matt's role in the Strategic Skills Initiative as Employer Associate will include employer interviews, industry and employer metrics for occupational shortages and skill gap needs, report writing, and other duties as assigned.

### **Consultant Assistance**

Contracted support for the Strategic Skills Initiative is currently in the procurement process in accordance with all local, state and federal procurement requirements. Consultant assistance includes:

- ERISS job vacancy survey of employers, which was already procured by IWD.
- A consultant (TBD) that will provide much of the initial momentum for staff training and development for this initiative. The consultant will initially take the lead in all activities, research, and report writing as needed for all three industries, including: research, focus groups, coordination with existing industry reports, coordination with ERISS reports, development of drafts and the final report, project management, interviews with key industry leaders and training of internal staff.
- Workforce Associates will provide ongoing workshops and training to assist with research, implementation and compilation of all reports. WA assistance was already procured by IWD.
- Two internships will be made available to students from local universities to assist with the Strategic Skills Initiative for data collection, analysis and other activities as needed. Relevant work experience on this initiative will increase students' interest and preparation for careers in demand-driven workforce development.

### *Coordination of Efforts across Current WIB Boundaries*

Our organizations have worked together to form the Community Workforce Compact, a unified grassroots effort that began in 2001 to build a successful workforce strategic network throughout the seven counties of Northwest Indiana. 150 leaders from business, labor, education, community organizations and economic development volunteered their time to participate on four goal teams that were given the mission to increase the skills of the current workforce, prepare youth for success, diversify the economy and improve systems between workers and employers. As a result, a number of key initiatives and tools have been developed to meet those objectives.

- A Web site was created ([www.cwcompact.com](http://www.cwcompact.com)) to provide youth with information about careers in growth industries in Northwest Indiana, along with career ladders, job descriptions, information about salaries, education required and how to get there
- A database of available sites and buildings in Northwest Indiana was updated and that information was integrated with the latest labor data and other vital statistics for decision-makers looking to expand or relocate to the region.

In addition to the Compact, CWI and LCISDB have jointly supported a single Incumbent Worker Council for the area and have successfully managed a National Emergency Grant between two service providers that served 970 dislocated workers with training and employment assistance.

### *Specific Plans to Integrate Regional Sector and Industry Representatives*

Our Strategic Skills Initiative will conduct focus groups and individual interviews with employers in each selected industry cluster to ensure that subsequent efforts are focused on the real needs of these employers. Various organizations like Chambers of Commerce and industry-specific associations will be contacted to identify key industry representatives and help facilitate

our interaction with the leaders of these industry clusters for this initiative. Key agencies and partners across the region have already committed their support to reach out to employers in the selected industries and assist with this initiative. Employers will serve in advisory capacities to validate the research, recommendations and implementation activities. A number of employers from several industry sectors have already joined our consortium. Secondary research and industry directories will be utilized to identify companies in each sector and ensure that optimal representation is achieved.

#### *Primary Research Needed*

A telephone survey of employers has been conducted by ERISS to determine critical occupation shortages for employers in a range of industries throughout the seven counties of Northwest Indiana. Responses from over 250 employers will be analyzed to help determine the key industry clusters that will be chosen for this initiative.

Each industry cluster has a range of employers who vary in size, customer orientation, depth of technology usage and other important factors that have an impact on critical skills needed and any shortage of qualified workers. In-depth interviews across each industry and in each county are critical to determine the regional scope of each occupational skill shortage, the available pool of workers, and solutions that meet the needs of these employers. These interviews will require the support of staff and qualified research support.

#### *Detail of Activities*

9/06/05 – 10/21/05

##### Phase 1: Occupational and Skills Shortages Report

- Conduct research to identify occupational and skill shortages in key industries critical to the economy in Northwest Indiana, including relevant primary and secondary data.
  - Review of existing secondary data from reports produced by CWI and LCISDB.
  - Integrate ERISS data into the research information.
  - In-depth study and analysis on specific occupations and skill sets in shortages through surveys, interviews and focus groups with 3 -5 key industry experts within the industry clusters.
- Continue work with key experts in validation of the occupations and/or skill sets selected for further study.
- Provide specific numeric estimates of projected occupational shortages for short term (two years) and long term (10 years).
- Provide summary of analysis and quantification of occupational and skills shortage into a cohesive report.

10/31/05 – 12/16/05

##### Phase 2: Root Causes Report

- Conduct research to determine root causes of occupational and critical skill shortages in key industries and whether they are traced to supply and/or demand side causes, using both primary and secondary resources if necessary. Activities include:

- Conduct six employer focus groups
- Conduct six employee focus groups
- Conduct employer and incumbent worker survey
- Conduct three focus groups with youth
- Conduct three focus groups with job/career changers
- Conduct at least fifteen interviews with industry associations, universities, individual employers, and incumbent workers throughout the region
- Complete comprehensive analysis based on results of research.
- Detailed description of each root cause, showing its relative importance in addressing skill shortages, and evidence as to how the root cause was identified.
- Provide summary of findings with validation of all data into a cohesive report.

1/02/06 – 2/21/06

#### Phase 3: Regional Solutions Report

- Conduct research to develop solutions that are tied directly to the root causes, including best practices and priorities.
  - Facilitate solutions meetings with industry associations, universities, individual employers, and incumbent workers to explore solutions.
- Provide summary of findings to include validation of data.
- Compile summary of solutions tied directly to the root causes into three cohesive reports, one for each industry.
- Provide employers with solutions and credible evidence as to how they will have a direct effect on the root causes.
- Develop an action plan for implementing the solutions including roles and responsibilities, results expected from each action, and how existing regional resources in the public and private sectors will be reallocated and/or leveraged to carry out planned activities and sustainability.
- Develop an implementation and execution timeline that illustrates important dates for implementation, responsible parties, and resource allocation.
- Work with agencies that have direct involvement in the solutions implementation phase to make sure that they are properly engaged.
- Evaluate and measure the success of implemented solutions to ensure that the implemented solutions are actually alleviating occupation and skill shortages. Evaluation/measurement of success must be provided.
- An industry summit for each selected cluster will be conducted to provide a public forum for dissemination of information. These summits will be designed to engage industry employers and community leadership for ongoing validation of employer needs, continuous improvement, sustainability and collaborative steps for future activities to support the mission of the Strategic Skills Initiative.

CWI and LCISCB believe that this initiative builds upon the intensive work we have already completed over the last few years to build a diverse, world-class workforce. This funding will allow us to move forward with a fully integrated regional workforce strategy that leverages the strengths of our strongest industries and meets their future workforce needs, thereby making Region 1 globally competitive. Thank you for this opportunity.



**Strategic Skills Initiative EGR # 1 : CWI & LCISDB**  
**Planning Activities and Schedule**

<b>Project Activity 1:</b> Review existing data and reports, Conduct primary and secondary research, online workshop (TBD), Coordinate with ERISS data, Interviews with key experts.	<b>Timeline:</b> 07/26/05 – 08/31/05	<b>Staff Responsible &amp; Agency:</b> VP, Matt Hunter CWI, Tina Rongers LCISDB	<b>Effort/Work Hours:</b> 352 hours	<b>Product Produced (if applicable):</b> Synthesis of findings, Summary of interviews
<b>Project Activity 2:</b> Present data to lead team members	<b>Timeline:</b> 08/31/05	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI and Jim McShane, LCISDB	<b>Effort/Work Hours:</b> 27 Hours	<b>Product Produced (if applicable):</b> PowerPoint presentation
<b>Project Activity 3:</b> Develop outline, drafts and final Critical Skills Shortage report	<b>Timeline:</b> 08/15/05 – 09/23/05	<b>Staff Responsible &amp; Agency:</b> VP, Matt Hunter CWI, Tina Rongers LCISDB	<b>Effort/Work Hours:</b> 374 hours	<b>Product Produced (if applicable):</b> Draft report Outline, Draft Report, Final Critical Skills Shortage Report
<b>Project Activity 4:</b> Presentation to lead team members	<b>Timeline:</b> 9/30/05	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI and Jim McShane, LCISDB	<b>Effort/Work Hours:</b> 27 hours	<b>Product Produced (if applicable):</b> PowerPoint presentation
<b>Project Activity 5:</b> Submit critical shortage report	<b>Timeline:</b> 10/14/05	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI	<b>Effort/Work Hours:</b> N/A	<b>Product Produced (if applicable):</b> Critical skills shortage report
<b>Project Activity 6:</b> Root Cause – Identify focus group invitees, Hold focus group meetings and/or other meetings with employers, Survey Employers and incumbent workers, online workshop (TBD), Interviews with key stakeholders, Focus groups and surveys with youth and job seekers.	<b>Timeline:</b> 08/15/05 - 10/21/05	<b>Staff Responsible &amp; Agency:</b> VP, Matt Hunter CWI, Tina Rongers LCISDB	<b>Effort/Work Hours:</b> 1,110 hours	<b>Product Produced (if applicable):</b> N/A

<b>Project Activity 7:</b> Develop outline, draft and final root causes report.	<b>Timeline:</b> 10/21/05 – 11/22/05	<b>Staff Responsible &amp; Agency:</b> VP, Matt Hunter CWI, Tina Rongers LCISDB	<b>Effort/Work Hours:</b> 349 hours	<b>Product Produced (if applicable):</b> Draft report outline, Draft report, Final root causes report.
<b>Project Activity 8:</b> Presentation to lead team members	<b>Timeline:</b> 11/28/05	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI and Jim McShane, LCISDB	<b>Effort/Work Hours:</b> 27 hours	<b>Product Produced (if applicable):</b> PowerPoint presentation
<b>Project Activity 9:</b> Submit root cause report	<b>Timeline:</b> 12/9/05	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI	<b>Effort/Work Hours:</b> N/A	<b>Product Produced (if applicable):</b> Root cause report
<b>Project Activity 10:</b> Online workshop (TBD), Develop draft outlines, draft reports and final reports of regional solutions. (3 reports)	<b>Timeline:</b> 12/05/05 – 1/23/06	<b>Staff Responsible &amp; Agency:</b> VP, Matt Hunter CWI, Tina Rongers LCISDB	<b>Effort/Work Hours:</b> 595 hours	<b>Product Produced (if applicable):</b> Draft report outlines, Draft reports, Final regional solution reports
<b>Project Activity 11:</b> Presentation to lead team members	<b>Timeline:</b> 01/30/06	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI and Jim McShane, LCISDB	<b>Effort/Work Hours:</b> 27 hours	<b>Product Produced (if applicable):</b> PowerPoint presentation
<b>Project Activity 12:</b> Submit regional solutions reports	<b>Timeline:</b> 02/14/06	<b>Staff Responsible &amp; Agency:</b> Linda Woloshansky, CWI	<b>Effort/Work Hours:</b> N/A	<b>Product Produced (if applicable):</b> Regional solutions reports
<b>Project Activity 13:</b> Consultant coordination, assistance and training.	<b>Timeline:</b> Ongoing for all phases.	<b>Staff Responsible &amp; Agency:</b> Consultant (TBD)	<b>Effort/Work Hours:</b> 860 hours	<b>Product Produced (if applicable):</b> Research data, analysis and services for final report.
<b>Project Activity 14:</b> Internships	<b>Timeline:</b> Ongoing for all phases	<b>Staff Responsible &amp; Agency:</b> Interns	<b>Effort/Work Hours:</b> 133 hours	<b>Product Produced (if applicable):</b> N/A

**Strategic Skills Initiative Pre-Research & ID Phase**  
**Line Item Budget Request**  
**Economic Growth Region # 1 : CWI & LCISDB**

SB

08/04/05

**Detailed Budget**

<b>Description</b>	<b>Amount Requested</b>
<b>Staff Costs</b>	<b>127,564.00</b>
- Strategic Planning Mgr \$60,000 x 7 months x 100% of time	35,000.00
- Data Analyst \$51,000 x 7.75 months x 50% of time	16,469.00
- Employer Assoc. \$55,000 x 7.75 months x 75% of time	26,641.00
- Clerical x \$14.90 per hour x 7.75 months x 100% of time	20,016.00
Fringe Benefits (Rate 30%)	29,438.00
<b>Consultant Assistance</b>	<b>165,404.00</b>
- Job Vacancy Survey	13,454.00
- Optional additional survey work to cover any gaps in data	10,000.00
- Contract will include the following for three industry reports (RFP in process) Conduct research, focus groups, coordination with existing industry reports, coordination with ERISS reports, develop draft and final report, travel expenses, project management, interviews with key industry leaders and training of internal staff.	130,000.00
- Workforce Associates (Training)	9,950.00
- Interns 2 at \$1,000 each	2,000.00
<b>Travel Expenses</b>	<b>7,573.00</b>
- Seven Counties mileage for meeting attendance (Six people x 140 miles round trip x 2 meetings/ mth for 7.75 mths at \$.34/ mile)	4,427.00
- Interviewing employers, administering surveys, prep work for focus groups (Six people X 32 miles round trip X 3 times per week for 12 weeks at \$.34/ mile)	2,350.00
- Facilitate focus groups for three industry studies (Six people x 130 miles round trip x 3 focus group mtgs at \$.34 / mile)	796.00
<b>Other Expenses</b>	<b>55,819.00</b>
- Postage \$200 per month x 7.75 months	1,550.00
- Utilities \$375 per month x 7.75 months x 10%	291.00
- Copier \$924 per month x 7.75 months x 10%	728.00
- Telephone \$117 per month x 7.75 months	907.00
- All other overhead costs \$100 per month x 7.75 months	775.00
- Executive Team, Consortia meetings \$200 room rental x 5 mtgs	1,000.00
- Focus group stipends (6 groups x 12 people/ group x \$25)	1,800.00
- Office supplies, consumables \$1,500 per month x 7.75 months x 10%	1,163.00
- Rent \$4,175 per month x 7.75 months x 10%	3,269.00
- Print three industry reports	4,200.00
- Three industry summit meetings w/ public @\$1,500 room, equip rental	4,500.00
- Fiscal, Oversight, Prog & Fiscal Monitoring, Audit	35,636.00
<b>Total Detailed Costs</b>	<b>356,360.00</b>

**Center of Workforce Innovations, Inc.**  
**Budget Analysis - Strategic Skills Alliance Grant**  
**Reasonableness Test**

SB  
08/04/05

Description	Grant Budget	Market or other Comparative Data	Comp Data Source	Compared to mkt price	Compared other offers	Verified computations	Cost is reasonable	Comments
<b>Staff Costs</b>							X = yes, O = no	
<b>Labor</b>		Salary range	Career Infonet	Indiana wages	***			
Strategic Planning Mgr \$60,000 x 7 months x 100% of time	35,000	\$41,100 - \$108,000						
Data Analyst - \$51,000 salary 50% time (7.75 months)	16,469	\$26,600 - \$89,900	Market Research Analyst	X	N/A	X	X	
Employer Assoc -\$55,000 salary 75% time (7.75 months)	26,641	\$26,600 - \$89,900	Market Research Analyst	X	N/A	X	X	
Clerical - \$14.90 per hour x 2080 hours / 12 x 7.75 months	20,016	\$10.00 - \$17.00 per hour		X	N/A	X	X	
			Dept of Labor Employee					
Benefits at 30%	29,438	20% - 30% is average	Benefits Research Institute	X	N/A	X	X	
Total Labor & Benefits	127,564							
<b>Contractual</b>								
ERISS study	13,454	Procurement- State of Indiana				X	X	
Optional additional survey work to cover any gaps	10,000	\$16,200 for another 900 surveys	Quote from ERISS					
Contractor ***	130,000	RFP - see below			X	X	X	
Workforce Associates	9,950	Procurement- State of Indiana				X	X	
Interns 2 at \$1,000 each (equivalent to 133 hours at \$15/ hr)	2,000	\$10 - \$20 per hour	Star Staffing, Elwood Staffing	X	X	X	X	*** Best est. -Includes internal staff training, must take into account size of population, large geographic area, demographics
Total Contractual Costs	165,404							
<b>Travel</b>								
6 people x 140 miles x 2 mtgs / mth at \$.34/ mile for 7.75 mths	4,427	Up to \$.405/ mile allowed - IRS	IRS Website	Federal	N/A	X	X	
6 people X 32 miles X 3 times/ wk for 12 wks at \$.34/ mile	2,350	Up to \$.405/ mile allowed - IRS	IRS Website	Guidelines	N/A	X	X	
6 people x 130 miles x 3 focus gp mtgs at \$.34 / mile	796	Up to \$.405/ mile allowed - IRS	IRS Website		N/A	X	X	
Total Travel	7,573							
<b>Other Costs</b>								
Postage \$200 per month x 7.75 months	1,550	Small overhead item		Not material	N/A	X	X	
Utilities \$375 per month x 7.75 months x 10%	291	Small overhead item		Not material	N/A	X	X	
Copier \$924 per month x 7.75 months x 10%	728	Small overhead item		Not material	N/A	X	X	
Telephone \$117 per month x 7.75 months	907	Small overhead item		Not material	N/A	X	X	
All other overhead costs \$100 per month x 7.75 months	775	Small overhead item		Not material	N/A	X	X	
Exec Team, Consortia mtgs \$200 room rental x 5 mtgs	1,000	Small overhead item		Not material	N/A	X	X	
Focus group stipends (3 groups x 12 people/ group x \$25)	1,800	Prior yr focus groups	Market Voice Consulting	X	N/A	X	X	Same as prev focus gp stipend
Office supplies \$1,500 per month x 7.75 months x 10%	1,163	Small overhead item		Not material	N/A	X	X	
Rent \$4,175 per month x 7.75 months x 10%	3,269	Costs compared at lease renewal		X	N/A	X	X	
Print three industry reports	4,200	Pr yr three rpts \$1,330 each	Datagraphic Printing	X	N/A	X	X	
Three ind summit mtgs w/ public @\$1,500 room, equip rental	4,500	Pr yr ind summit mtgs \$1,400 ea.	Strongbow, Avalon	X	N/A	X	X	
Fiscal, Oversight, Prog & Fiscal Monitoring, Audit	35,636	State standard 10%		X	N/A	X	X	
Total Other Costs	55,819							
Total All Costs	356,360							

\*\*\* RFP is in process.



Strategic Skills Initiative Research & ID Grant  
Line Item Budge Request

Economic Growth Region # 1 : Center of Workforce Innovations  
Lake County Integrated Services  
Delivery Board

ITEM	AMOUNT REQUESTED
1. Staff Costs	\$127,564
2. Consultant Assistance	165,404
3. Travel Expenses	7,573
4. Other Expenses	55,819
<b>TOTAL REQUEST</b>	<b>\$356,360</b>

1. **Staff Costs:** Prorated wages and benefit costs for that portion of time staff actively work on the project. Staff time charged to the project must be documented (i.e. time sheets).
2. **Consultant Assistance:** Costs for consultants assisting with the project. Include both consultant fees and expenses here. Please note that contracts for consultant services must meet all applicable state and local procurement requirements
3. **Travel Expenses:** Transportation (i.e. mileage), lodging, and meals (or Per Diem) costs for staff and other personnel (excluding consultants) participating in the project.
4. **Other Expenses:** Include costs such as: meeting room costs; purchase of data, reports, and materials; data processing fees; and printing expenses.

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**\*NOTICE:** Attach a detailed justification for all requested costs by line item. The justification must explain what is being requested in relation to the work statement, as well as the "reasonableness" of the amount being requested – this is a critical piece that must be well developed in order for the state to determine final funding levels.